



Enterprise Content Management Server User's Guide

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1.0 Introduction to Kentucky.gov

Kentucky.gov is the Commonwealth of Kentucky's official Web portal (<http://Kentucky.gov>). The portal is a collaborative effort between the Commonwealth of Kentucky and Kentucky Interactive, LLC. It was built and is marketed, operated, and maintained by Kentucky Interactive, a Frankfort-based wholly-owned subsidiary of the eGovernment firm, NIC (Nasdaq: EGOV).

2.0 What is the Microsoft Content Management Server?

Microsoft Content Management Server (MCMS), referred to as CMS hereafter, is a web-based system and set of tools that enable web content authors to create and edit web pages in a scalable managed Web site without having to know hypertext markup language (HTML).

Users who are already familiar with Microsoft products will find generating content similar to creating a Microsoft Word document. In fact, much of the content users create can be composed in Microsoft Word, copied and pasted into Notepad (to remove unnecessary formatting), then copied and pasted into your CMS Web site.

After a Web site is built in CMS, updating and maintaining the pages is easy. The only thing a user needs to do to update or create a new page is go to their site via a special URL. Once they have logged in using their Kentucky.gov login name (the same login used for the Enterprise Calendar and Enterprise Newsroom), the site will open up with added features allowing them to change and style text, insert images, attach files for downloading, create simple tables, create hyperlinks and much more.

CMS content creators use Site Manager and Web Author to create and edit web pages.

With **Site Manager**, Web site owners can create and maintain channels (directories), administer rights and permissions to Web Authors and Editors, create Resource Galleries and other duties

normally associated with Web site management. This tool is typically used by the Web site's managers and allows a birds-eye view of all postings (pages) and channels of a CMS site. This tool functions alot like Microsoft Windows Explorer so it will be intuitive to most users.

Using the **Web Author** tool, Web site owners create, edit, and delete web pages. They can insert images, links, and documents as well as a host of other options that will be detailed later in this guide.

System Requirements:

- Windows PC running Win 2000 (with Service Pack 4) or Windows XP Pro (with Service Pack 1 or 2)
- Hard drive formatted for NTFS (NOT Fat32)
- MS Internet Explorer 6+
- An Internet connection

3.0 What is the Building Process for a New or Redesigned CMS Web site?

Agency Interest

When an agency decides they would like a CMS Web site, they simply need to contact Kentucky.gov at (502) 875-3733.

Work Request Form

Once the agency has expressed an interest, they will be asked to complete a Work Request Form. This form allows Kentucky.gov to understand what the agency's needs are as well as what type of system they are currently using, among other things that may be involved in the project.

Initial Consultation

Once the Work Request Form has been received, Kentucky.gov project

managers will schedule a meeting with representatives from the agency to explain the development process timeline, identify project leader roles, and determine general requirements, the Web site domain name and scope of the project.

Design Prototypes

After the initial consultation, the Kentucky.gov creative services department conceives a design based on input from the project managers and the initial consultation and creates a static prototype for the agency to review and comment on.

Define Site Architecture

Creative services can assist with and suggest a working architecture solution. Too often an agency's concept of the site's architecture is internally focused when instead a Web site should be designed based on the user's perspective. Kentucky.gov plays a vital role in advocating the needs and inclinations of both internal and external users.

Determine Page Layouts and Gather Template Requirements

After site architecture has been decided upon, a walk through of the future site with visual sketches of representative pages helps define what templates will need to be generated for the agency.

Build Templates/Test Environment

The complexity and number of templates determines the length of time needed for Kentucky.gov to generate a test version of the project site.

Train Users while they Populate the Test Site

Once the site is on the Kentucky.gov test servers, the web authors will be trained hands-on to build pages in CMS by creating the pages of their site.

Q & A Check Test Site

After building the site on the test server, responsible parties will review and check each page and link before giving their approval to "Go Live."

Migrate Test Site to Production

Kentucky.gov development staff will package up the test version of the new Web site and place it on the World Wide Web for all to see and use. In order for your users to be able to author or edit content once the Web site is in production they will need to obtain a user ID and password (see Section 5.0 How do I sign up to utilize CMS?). This should be done in advance of the launch to allow users to begin editing the pages as soon as the site is live.

4.0 What are the Common CMS User Roles?

The maintenance of a Web site requires several different types of users with varying levels of responsibility and permission. CMS organizes these users into the following groups with their associated abilities: guest, subscriber, author, editor, moderator, template designer, resource manager, channel manager, and administrator.

The workflow of the Web site can be controlled to meet the business process of the entity maintaining the Web site.

Author

An author can:

- create, edit or delete web pages in their channel of the Web site
- "Submit" their changes, which will prompt the editor or moderator to approve these edits
- add/modify resources in their designated resource gallery

Editor

An editor can:

- do all of the same things as an author plus,
- Has the ability to "Approve" or "Decline" pages, which enables the changes to take effect on the live site immediately

Moderator

Moderators are similar to editors, but moderators can also approve publication details, such as lifetime and Web crawler options where editors can only approve content.

Resource Manager

Resource Managers can maintain and update resources in the galleries in which they have rights. (A resource gallery is a repository of Web site assets like images, Word documents, Excel files, or any other file Web site owners wish to provide on their site.)

Channel Manager

A Channel Manager has access to do all of the above as well as add, edit, and delete channels and resource galleries through the use of Site Manager.

Administrator

The Administrator specifies access to channels, galleries and folders for a rights group. The Kentucky.gov portal staff will perform the role of Administrator.

5.0 How do I sign up to utilize CMS?

In order to take advantage of CMS, your agency's Web site needs to be hosted by Kentucky.gov. Your agency needs to establish its users for the CMS Web site and their user roles. Each user will need an individual Kentucky.gov account. To establish an account, the user must first register by visiting <http://www.kentucky.gov/Register.htm> and completing the self-registration process.* Once the self-registration process is complete, the Content Management Authorization Form needs to be completed and signed by the individual responsible for approving the agency Web site prior to faxing or mailing back to Kentucky.gov. (See attached Content Management Authorization Form)

***PLEASE NOTE:** If your users have previously registered for either the Kentucky.gov Newsroom or the Calendar they do NOT need to re-register through the self-registration process. The user ID they use for the Newsroom or Calendar will be their CMS user ID as well. Users would simply need to put this ID on the Content Management Authorization Form.

6.0 Terminology/Definitions

General Terminology/Definitions

Breadcrumbs – A navigational aid located at the top of every page just under the banner. This set of links separated by a greater than symbol lets the user know "You Are Here". (The term breadcrumbs was taken from the Grimms fairy tale "Hansel and Gretel" where the children left a trail of breadcrumbs behind them to help find their way home through the woods.)

Channel – A directory or folder on a CMS Web site. Channels are like folders on a personal computer to keep the similar content of the Web site organized into discrete areas.

Custom Mode – A mode that allows the Web site author or editor to

create links unique to that page. Unlike Inherit Mode (see below), any site navigation or entity footer controls set to Custom Mode, will NOT display the links of the parent posting.

Display Name – Appears on web pages in places like the breadcrumbs, left navigation, site map and it appears as the last part of the title of the page.

Generate Mode – Generates the navigation based on the channels and postings in the current channel level and below.

Inherit Mode – If a control is set to Inherit Mode it will inherit its list of links from the configuration of the list of links present in the default posting of the channel in which it resides. If that same control in the default posting of that channel is set to inherit also, it will inherit from the default posting of the “parent” channel and so on.

Name – Name of posting/page appears in the URL

Posting – An entry in the database that holds the actual content of a page. It can be the words and pictures a user places on the page. This is separate from a template. A posting appears to the end user as a web page.

Resource – Any file that can be inserted in or attached to a page, whether it is a shared resource from a Resource Gallery or a local resource from a users desktop. Examples of this are images, a media file, or an attachment.

Rich Edit Control– Text area that allows you to enter attachments, images, links or raw HTML.

Root Channel – Your “Home” directory. All channels and postings will fall beneath (or within) your Root Directory.

Site Manager – This is a tool used to create channels (directories), resource galleries, and template galleries. Site Manager works similar to Windows Explorer. It allows you to have a bird’s eye view of your Web site.

Template – This is the file that posting content is placed into. It makes up the structure of the page, holding everything in place, and it

provides the look and feel of the page. Templates are created by developers at Kentucky.gov and are stored in template galleries available to authors when creating a new page.

Web author console – This console allows you to manage your CMS pages in a number of ways. Below is an example of what the Web author console looks like as well as definitions/functionality for the items in the console.

CMS Web Author Console Terminology/Definitions/Functionality:

| CMS Web Author Console | | | |
|--|---|--|---|
| Switch To Live Site Page Status: Published Lock Status: Not Locked | Preview Create New Page Create Connected Page Edit Delete Copy Move | Production Manager Approval Assistant Resource Manager | Page Properties Revision History View Revisions by Date Channel Properties |

Switch to Live Site – Switches you from edit mode to the live site (what constituents would see on the live Web site).

Page Status – Tells you what status your page is in such as “Saved” (saved NOT submitted), “Waiting for editor approval” (submitted but NOT approved) or “Published” (approved and live on the Web site).

Lock Status – Shows if the page is locked (being edited) by another user and who the user is.

Preview – Allows you to look at the current saved page.

Create New Page – Allows you to create a new page by choosing a template, entering content, and saving the new page.

Create Connected Page – This function is not in use at this time.

Edit – Allows you edit content for the page you are on.

Delete – Allows you delete the page you are on.

Copy – Allows you to copy the page you are on.

Move – Moves page to a new channel

Production Manager – Allows you to find files that are in a saved state. This would be used if your page is saved because you cannot navigate to it by any other visible means.

Approval Assistant – Allows you to find files that have been submitted but not yet approved.

Resource Manager – How you add/edit/delete files to the resource galleries.

Page Properties – Allows pages to become left hand navigation items, gives you a number of publishing options such as breadcrumb naming.

Revision History – View different versions of the page from the first creation of that page to current and view all versions. It also allows you to compare versions such as source code and visual aspects.

View Revisions by Date – Another way to search page revisions.

Channel Properties – This function allows you to edit and view the channel properties similar to the page properties.

Web Author formatting controls: (see Figure 1.)

This set of tools is virtually identical to the formatting controls found in Microsoft Word. The following tools are available:

- Font Style (Normal, Heading 1; Numbered List, etc.); Font Face; Font Size;
- Insert Image, Video, Attachment, Table;
- Edit/Insert Hyperlink;
- HTML (Allows you to see the actual HTML code behind your posting or channel);
- Cut, Copy, and Paste; Undo and Redo; Spell Check;
- Bold; Italics; Underline
- Text Color; Background Color;
- Align Left, Center, Right;
- Numbered List; Bulleted List;
- Decrease Indent; Increase Indent

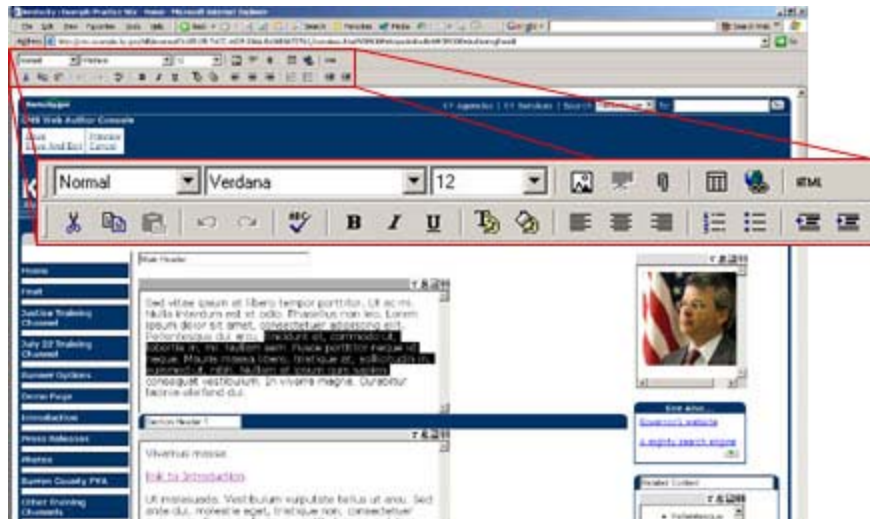


Figure 1.

7.0 How Do I Sign Into CMS?

Once your agency Web site has been set up in CMS, you will be given a link where you can log into a CMS test environment. The link will be similar to this "<http://cms.test.entity.ky.gov/cms/login.aspx>". This test environment will allow you to begin creating your site and to test the functionality of CMS. We will give you a user name and password to use in the test environment.

Once your site moves from the test environment into the production environment, the link that you will use to edit your page will change. The link will be similar to this "<https://cms.entity.ky.gov/cms/login.aspx>" and your user name for the production environment will be the one that you established through the self-registration process.

NOTE: All Kentucky State agencies/cabinets/entities are required by Kentucky Enterprise Standards to utilize a ".ky.gov" domain name. Please read the following excerpt from the 7010 Enterprise Standards:

July 1, 2004 - agencies must discontinue presentation of .com, .org, and .net-based names to the public as the URL. Agencies may still choose to purchase alternate names to reserve use of those. COT will continue to resolve alternate names until individual agencies direct COT otherwise.

For additional information on the Kentucky Enterprise Domain Naming Convention, please see the COT ruling on this subject at:
<http://webtoolkit.ky.gov/>

8.0 How Do I Create a New Posting?

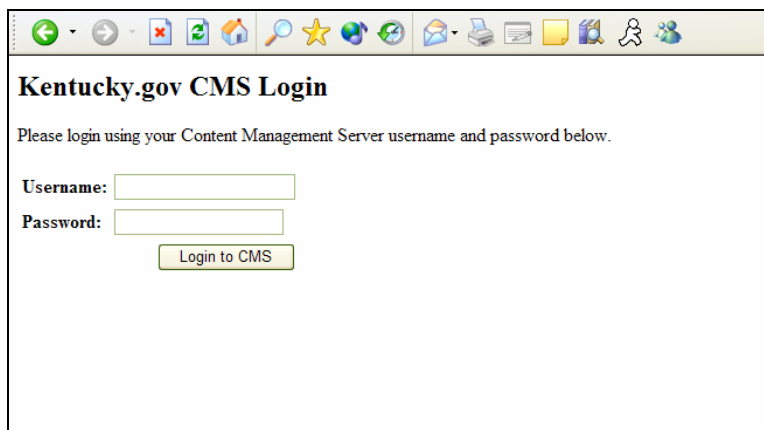
Please follow the steps below to author a new posting in CMS.

Step # 1: Log in to CMS

To author a new posting, the first thing you need to do is sign in to the CMS system. The login web address is:

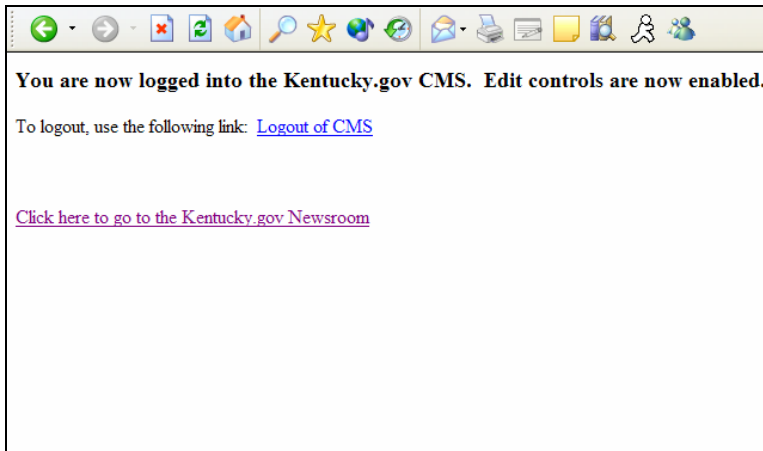
<https://cms.test.entity.gov/cms/Login.aspx> (note: replace the word "entity" with your site name)

Figure 2.0

A screenshot of a web browser window showing the 'Kentucky.gov CMS Login' page. The browser's address bar is empty, and the toolbar shows various icons. The page title is 'Kentucky.gov CMS Login'. Below the title, a message reads: 'Please login using your Content Management Server username and password below.' There are two input fields: 'Username:' and 'Password:'. Below the 'Password:' field is a button labeled 'Login to CMS'.

You will know that the login was successful by receiving positive notification as shown in Figure 2.1.

Figure 2.1



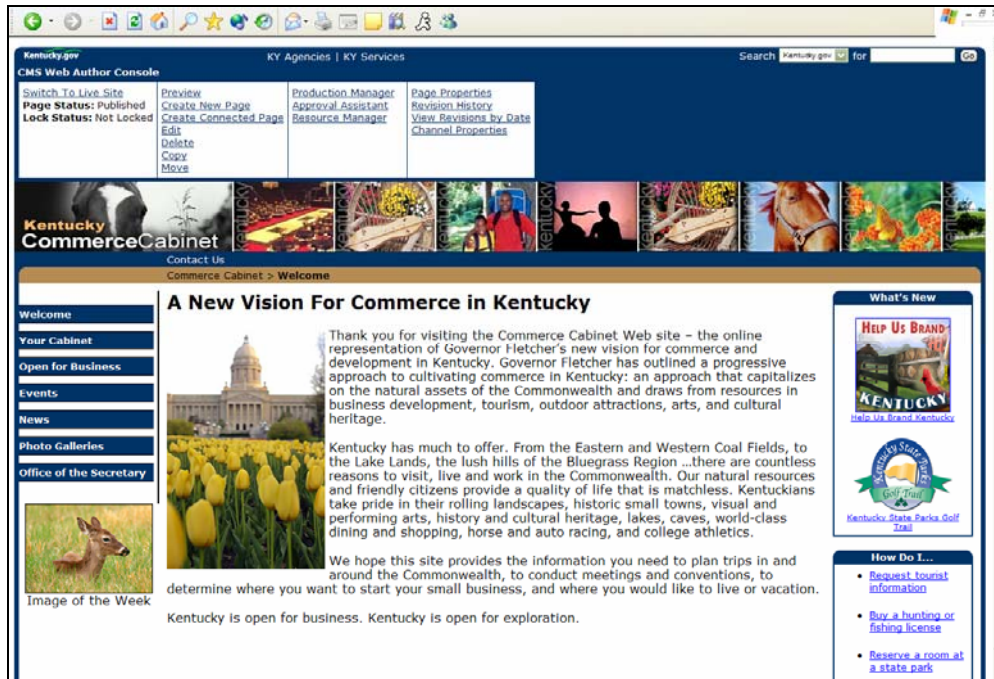
Step # 2: Switch to Edit Mode

Once you have successfully completed the login process and you navigate to your site, you will see "Switch to Edit Site" in the upper left corner. Click on this to go into edit mode. (Figure 2.2)

Figure 2.2 (Live Mode)



Figure 2.3 (Edit Mode after you click "Switch to Edit Site")



Step # 3: Create New Page

To create a new page click the "create new page" link in the set of links in the web author console.

Step # 4: Select Template

A new window will be spawned. From this window navigate to the template you wish to use. See the next section on choosing a template.

Step # 5: Enter Content

Enter content into the page as desired.

Step # 6: Save

Choose "Save and Exit" when you are finished. Your session will time out if you are idle for more than 20 minutes. If you need to leave your work for an extended period, or have made a significant amount of progress that you want to be sure not to lose, you can choose "save".

Step # 7: Submit (Author Only)

If you are an author, you will only be able to submit your newly authored posting by using "Submit" link in the authoring options box. It will not be viewable on the Web site until an editor has reviewed and approved the new posting.

Step # 8: Approve (Editor)

As an editor, you can approve a new posting by clicking on the "Approve" link.

9.0 How Do You Decide Which Template to Use?

Step # 1: Login into Site Manager

Determine the type of template you need for the posting you intend to create: Home, Newsroom, Contact (form), Photo Gallery, Site Map, or Generic. Generic will be the most commonly used template. The Redirect template is located in the G2P folder.

Step # 2: Open your Template Gallery

Navigate to your Template Gallery and make your selection.

10.0 How Do I Make a Posting Show in the Left Navigation?

Step # 1: Navigate to the Page

In edit mode navigate to the page you wish to appear in the left navigation and choose Page Properties in the Web Author Console.

Step # 2: Edit Page Properties

Click the "Important Page" check box. This will place a link to this page (posting) in the left-hand navigation section.

11.0 How Do I Edit an Existing Posting?

Step # 1: Log in to MCMS

See #8 above.

Step # 2: Navigate to Page

You can type the url directly or use any of the navigation elements on the page. (Left Nav, Breadcrumbs, Site Nav, Entity footer or even links in the page or relative content boxes)

Step # 3: Switch to Edit Mode

Once you have successfully completed the login process and you navigate to your site, you will see "Switch to Edit Site" in the upper left corner. Click on this to go into edit mode.

Step # 4:

Select "Edit". This will open the controls on the page and allow you to manipulate the content.

Step # 5:

Modify the content as needed.

Step # 6:

Choose "Save and Exit" when you are finished.

Step # 7: Submit (Author only)

If you are an author, you will only be able to submit your newly authored posting by using "Submit" link in the authoring options box.

It will not be viewable on the Web site until an editor has reviewed and approved the new posting.

Step # 8: Approve (Editor)

As an editor, you can approve a new posting by clicking on the "Approve" link. Your changes will now be reflected on the live site.

12.0 How Do I Delete a Posting?

Step # 1: Switch to Edit Mode

Once you have successfully completed the login process and you navigate to your site, you will see "Switch to Edit Site" in the upper left corner. Click on this to go into edit mode.

Step # 2: Delete the Posting

If you choose the "delete" link at this point you will delete the page you are viewing. If you are a Channel manager you can also right click on a posting in Site Manager and choose delete (in this case the posting will go to the recycle bin enabling it to be restored).

13.0 How Do I Format the Text on My Web Site?

To format text on any CMS page is similar to the formatting in Microsoft Word. When you are in edit mode and are editing a page you will see a familiar looking tool bar at the top of your page. This toolbar will allow you to change the font of your text, allow you to **bold**, *italicize*, or underline your text. It will allow you to align your text to the left, right or center, attach pictures or insert attachments to your page. It will also allow you to create a hyperlink in your page.

14.0 How Do I Make a Line Break Without Paragraph Spacing?

Step # 1: Make a line break.

Hold the SHIFT key, then hit ENTER (return).

15.0 How Do I Copy Text From a Document into My Web Site?

Step # 1: Copy the text from your document

Highlight and copy the text from your original document into your clipboard by selecting the text you wish to copy and then clicking "Ctrl" + "C".

Step # 2: Paste the text into Notepad.

Open MS Notepad (Start>All Programs>Accessories>Notepad) place your cursor in the body of your Notepad file and click "Ctrl" + "V". This will strip away all formatting, including any HTML code that MS Word might add to the document.

Step # 3: Copy the text from Notepad

With Notepad still active, and your cursor in the white area click "Ctrl" + "A" and then "Ctrl" + "C".

Step # 4: Paste into the appropriate container on your CMS web page.

With your page in edit mode click place your cursor in your desired container and click "Ctrl" + "V". Now format the content you pasted using the formatting toolbar located near the top of your page.

16.0 How Do I Use the Relative Content Boxes?

Step # 1: Type or paste your heading

Follow the procedure in 15.0 if you are unsure.

Step # 2: Enter content in the boxed in area.

You can type and format text here or even copy content from another document as mentioned in procedure in 15.0. You can also place links, images, and/or downloadable resources in a Relative Content Box (see 17.0, 18.0, and 19.0).

17.0 How Do I Attach Documents to My Web Site?

Step # 1: Choose a location for the link

Place your cursor in the container you wish to place the document in.

Step # 2: Locate the attachment

Click on the ATTACHMENT tool (the paperclip icon in the toolbar at the top of the page) and navigate to the appropriate Resource Gallery (documents should be loaded into your Resource Gallery into a logical directory, this is often a mirror of the channel structure of your Web site).

Step # 3: Place the attachment

Once you have located the desired document, click the select icon next to the attachment you wish to place. You will be prompted to enter the display text. This display text is the text a user will click to download the attachment.

18.0 How Do I Create a Hyperlink to Another Web Site?

Step # 1: Choose a location in your site for the link.

While in edit mode of the page where your link will reside, type and select the text you wish to make a link.

Step # 2: Click on the **HYPERLINK** tool.

This will spawn a window which allows you to enter the hyperlink and provide certain attributes.

Step # 3: Type or paste the appropriate link into the space provided.

Hyperlink Address – the URL you should enter.

Tool tip – a message that will display in some browsers when the user hovers over the link (not required)

Open Link in – Window location for the URL to open in (default in most cases)

Name – If you want to make a link jump to a point in a page you will need to enter the name first. Then you can author another link that refers to this name.

(ie. [http://www.mysite.ky.gov/somearea/apage.htm#myname...where "myname" is the name you choose](http://www.mysite.ky.gov/somearea/apage.htm#myname...))

If the link is going to a page on your Web site, always use RELATIVE links (No <http://www.>). If the link is linking off your site, always use ABSOLUTE links (With the <http://www.>). For example: if you place a link on your homepage to a staff member's biography on your site it should look something like this... </staff/johnsmith.htm>.

IMPORTANT: If the link goes to a Web site that does not end in .gov, you should add a disclaimer following the link indicating that the user is leaving the .gov domain.

Step # 4: Choose OK

This will add the hyperlink or anchor to your page. In the case of a named anchor you will not see any noticeable difference like and underline, but behind the scenes the source of the page will have changed to allow you to link to that named anchor.

19.0 How Do I Insert an Image Into My Web Site?

Step # 1: Place your cursor in the container in which you wish to place the image.

Step # 2: Choose the Insert Image icon from the CMS toolbar at the top of the page.

Step # 3: Choose the desired image from your Resource Gallery.

NOTE: Images should be loaded into your Resource Gallery, in a logical directory (by Division, Department, Category, etc.). This is often most easily accomplished by simply mirroring the directory or channel structure of the channels of your Web site.

Step # 4: Take care to note that when you get the Image dialogue box and utilize the image as a link, that, by default, the link will be absolute. If the link is within your site, you should remove the root portion of the link, making it relative (see.18.0 step 3 above)

20.0 How Do I Get My Image to Fit Into My Web Site?

Step # 1: Best practice: crop and resize images **before** loading into your Resource Gallery utilizing a photo editing software such as PhotoShop, or Microsoft Office 2003 Picture Manager. Images should be cropped of unnecessary elements of the photo/image, and should be resized to a

manageable size for downloading (less than 10k for a small image or 25k for a big image). When you plan on posting a sequence of images or photos, consider using the Photo Gallery option (ask your CMS Project Manager for further details about the Photo Gallery option).

NOTE: If you are unable to acquire a Photo Editing software, you may still place an image on the page you are working with and resize it but your results will not be good. The file size will be unnecessarily large and the image less than clear.

Step # 2: Place your cursor in the desired container and choose the IMAGE icon in the CMS toolbar area at the top of the page.

Step # 3: Choose the appropriate image from your Resource Gallery.

Step # 4: Click on the image inside the container and use the control handles to resize the image. **NOTE:** This will NOT change the size of the file, but will allow you to change the visual size of the image.

21.0 How Do I Insert an Image Into a Resource Gallery?

Step # 1: Log in to your CMS site and go into Edit mode.

Step # 2: Choose Resource Manager from the web author links at the top of the page. This will spawn a window that allows you to access your Resource Gallery

Step # 3: Navigate to the desired directory within your Resource Gallery and choose ADD NEW...

This will spawn another window allowing you to browse to where your image is located (hard drive, CD, desktop etc.), choose a specific file type if the file has no file extension, and add a Display Name and Description.

Best practice: Always add a brief description of the image.

22.0 How Do I Change the Banner/Branding Images and the alternate text in the Banner/Branding area on My Web Site?

This is accomplished utilizing Site Manager. Banner/Branding Images are referenced through custom properties of their channel. If none are specified they inherit the properties of their parent channel up to the root of the site where these properties must be defined. To change these images you must know the dimensions and location of the image you wish to place. A total of 5 images can be placed in the branding area of your site. Please consider the combined width of the images you choose.

Step # 1: Be sure you have the images you want in the BrandingImages folder of your Web site resource gallery. All images should be the same height and of reasonable file size.

!Alert! - Due to a Symantec Firewall setting, users of this software may not be shown your banner/branding images if you name them, or the gallery they live in, any variation of the word "banner." Kentucky.gov has established a naming convention of "brandingImages" for the resource gallery and "someagencyBranding_01.jpg", ..._02.jpg, ..._03.jpg, ..._04.jpg, ..._05.jpg and ..._bg.jpg to address this issue. It is advised that your agency stay with this convention.

Step # 2: Right-click on the channel where you want to change banner images and choose Properties.

Step # 3: Choose the Custom tab and note the reference(s) to the current banner image(s) including background. To refer to an image in a resource gallery, preface the image path in this gallery with "CMS:". To invoke a random image selection script, preface a resource gallery path with "RANDOM:". You can use this same technique with the background image.

Note: This is an advanced feature. You should seek the assistance of Kentucky.gov if you have any questions.

Step # 4: Change the alternate text if necessary. The alternate text for all foreground images is set in one custom property. In the same set of custom properties you set in step3, change or add to the value of "Banner.Text".

23.0 How Do I Change the Site Navigation (above the breadcrumbs) on My Web Site ?

Step # 1: Login to your CMS website and navigate to the page in question. Go into Edit mode.

Step # 2: Click on the green arrow located above the Breadcrumbs. This expands that section of the page and, if in "custome mode" provides a brief form to add a link. Enter a URL and a display name for the link you are adding. Check the External link box if this link leaves the .gov domain. If you are in inherit mode the links will be the same as the parent channel.

Step # 3: Click Add New Link. You may now move the link left-to-right (or vice-versa), edit the text within the link, or delete the link.

24.0 How Do I Create a New Channel?

Step # 1: Open Site Manager

Step # 2: Right click on parent channel

Step # 3: Select "New Channel"

Step # 4: Provide a name in lowercase (all one word) and a display name (used in the URL, Left Nav, Breadcrumbs and Site Map). Be sure to provide information in the description for future editors and for an intuitive Site Map. Press OK.

25.0 How Do I Delete a Channel?

Step # 1: Open Site Manager

Step # 2: Expand the parent channel

Do this by clicking the plus sign (+) to the left of the parent channel.

Step # 3: Select (highlight) the desired channel, right -click on it and choose Delete.

26.0 How Do I Keep a Channel From Appearing in the Left Navigation?

Step # 1: In Site manager, go to the custom properties of the channel you wish to hide and add this custom property – “LeftNav.Hide” give the appropriate value (true/false)

27.0 How Do I Change the Order of My Channels?

Step # 1: In Site Manager, right-click on your root channel and choose properties.

Step # 2: Click on the Sorting tab

Step # 3: Highlight the channel in question and use the UP and DOWN buttons to the right to move the channel to the desired location, vertically, in the left-hand navigation.

28.0 How Do I Add My Own Style Sheet?

Step # 1: In Site Manager, right-click on your Root Directory and choose Properties. Then choose the Custom tab. There is a pipe (|) delimited list of stylesheets. Add as many as you like.

This should only be done by a Channel Manger who is familiar with CSS. Seek Kentucky.gov's assistance if you have any questions.

29.0 How Do I Add/Move/Edit/Delete the Entity Footer or Site Navigation Links?

Step # 1: You'll notice a green arrow located in the Footer section of your page. Follow the same steps as you would when adding, moving ,editing, or deleting a Site navigation link (section 23.0).

Step # 2: It is important to note that a Web site contact is required in the Entity Footer by Kentucky Enterprise Standards.

30.0 How Do I Create Meta Tags For My Web Site?

Step # 1: In Site Manager, choose the appropriate channel, right click and choose Properties.

Step # 2: Click on the Custom tab, then choose New.

Step # 3: Enter a custom property titled Keywords.

Step # 4: Add up to 256 characters of keywords separated by commas (,) This process can be completed for each channel within your Web site.

31.0 How Do I Allow Users to Search Only My Site?

At this time you must seek the assistance of Kentucky.gov developers for this feature.

32.0 How Do I Create a Contact Form?

Step # 1: Create a new page

Step # 2: Select "Contact Page" template

Step # 3: Set options and author content

Step # 4: Save page

Step # 5: Approve page

33.0 CMS Cheat Sheet

How Do I Create a New Posting

- Log into MCMS
- Switch to Edit Mode
- Create New Page (Author)

- Select Template
- Enter Content
- Save
- Submit
- Approve (Editor)

How Do I Edit an Existing Posting?

- Log into MCMS
- Navigate to Page
- Switch to Edit Mode
- Select "Edit"
- Modify Content
- Save
- Submit
- Approve (Editor)

How Do I Create a New Channel?

- Open Site Manager
- Right click on parent channel
- Select "New Channel"
- Enter Channel Information
- Press OK

How Do I Create a Contact Form?

- Create a new page
- Select "Contact Page" template
- Set options and author content
- Save page
- Approve page

34.0 Practice Exercises

To practice using CMS you can log into the practice site at <http://cms.example.ky.gov/cms/login.aspx> and use the user ID of "examplecm" with a password of "cmspwd!".

Site Manager Exercises:

Exercise 1: Create a new channel

1. Open Site Manager and log in with the following:
 - User ID: examplecm
 - Password: cmspwd!
2. Click on the folder icon in the left column called channels and click on the plus (+) sign to the left of "example.ky.gov".
3. In "example.ky.gov", right click on "commerce" and choose "New Channel"
4. You will need to give this channel a name, display name, and a description.
5. Name this channel your first name and last initial with no spaces for example [scottw].
NOTE: Name will appear in the hierarchy in Site Manager.
6. Give this channel a Display name by typing your full name the way you would like for it to appear in the breadcrumbs, the left-hand navigation, and in the site map tool for example [Scott Weber].
NOTE: Display Name will appear in the breadcrumbs, the left-hand navigation, and in the site map tool.
7. Give this channel a general description that explains the purpose of this channel.
NOTE: Description is used to describe the channel in the site map and to explain to users unfamiliar with the channel, its purpose.
8. Click ok to close.
9. Right click on your newly created channel and select "Properties".
10. Here you will find a set of tabs, click on the "Publishing" tab.
11. On this tab you will find "Options", "Lifetime", and "Channel Rendering". Click the "Select" button in the "Channel Rendering" section.
12. Verify that the radio button is selected next to "Use page with this name" and that it reads "default" in the first text box.
13. Click ok to close this window.
14. Click ok once again to close the "Properties" window and create

your new channel.

Exercise 2: Create a new resource gallery

1. While still in the Site Manager, click on the folder icon in the left column called "Resource Gallery".
2. Click on the plus (+) sign to the left of "example".
3. In "example", right click on "trainees" and choose "New" and "Gallery".
4. Name this gallery your first name and your last initial with no spaces for example scottw.
5. Give this gallery a general description.
6. Click ok to create this new resource gallery.

Web Author Exercises:

Have Site Manager open and minimized during these exercises.

Exercise 3: Create a new page

1. Log in to CMS using the following information
 - a. URL: <http://cms.example.ky.gov/cms/login.aspx>
 - b. User IDs: exampleauth / exampleedit/ examplecm
 - c. Password for all: cmspwd!
2. Navigate to the channel that you created in Site Manager by clicking on "Commerce Training Channel" in the left-hand navigation and then click on your channel (your first name and your last name (i.e. Scott Weber)).
3. After navigating to this channel you will see a generic CMS page. This is because there is no default posting for this channel. We will create that now.
4. Click on "Switch to Edit Site" on the right-hand side of the page.
5. Select "Create New Page" in the web author console.

6. A template gallery window will open. From the list of template galleries, choose "example". This will display a list of templates available for your site.
7. Click the "Select" icon to the right of the "ExampleGenericPage" template.
8. You will see a page that has the look and feel of the web site. In the first text box, enter a title for this page such as "Profile of "Your Name"" (i.e. Profile of Scott Weber)
9. Once you have given this page a title click "Save New Page" in the web author console. (NOTE: Be sure to save often because there is a 30 min session time out and you do not want to lose your work.)
10. In the save dialog box you will need to give your page a name. In general you should choose a name that is brief and clean as this name will be used in the URL. For this exercise name this page "default" as this will become the default posting for this channel. For the "Display Name" type "Profile". This will appear in the breadcrumbs and in the site map.
11. Click OK to save your page.
12. Note the status of this page in the upper left corner of the web author console is set to "Saved". This page is now ready to be submitted and approved for publication. If you should leave this page without submitting it, you can come back to it by opening the "Production Manager" in the web author console.
13. Click "Approve" to approve this page for publication.

Exercise 4: Editing a page

1. Navigate to your posting called "Profile" by clicking on "Commerce Training Channel" in the left-hand navigation and then click on your channel (your first name and your last name (i.e. Scott Weber)). The default page for this channel is the posting called "Profile". On this "Profile" page we want to learn about you.

2. If you are not in edit mode click on "Switch to Edit Site" then click on "Edit in the web author console. If you are already in the edit site, click on "Edit" in the web author console.
3. You will see the title that we had previously given to this page "Profile of "Your Name"". Below that title you will see a text box. Use this box to give a description of what users would find on this page. Type the following information in that text box:

"I would like to tell you more about me, "Your Name"."

4. Below the text box you just typed in, you will see a blue section bar with a small text box on the left side. In this box type "All About Me". This is a title to this section of the "Profile of "Your Name"" page.
5. Below the blue section bar you will see another, larger text box. In this text box type the following information:

Who:

Where do you work:

What do you do:

Favorite fruit:

6. With the information you just typed in the text box, answer those questions. Who are you, where do you work, what do you do, and from these choices: apple, orange, banana, or grapefruit, which of these is your favorite fruit. (If none of these are your favorite, humor us and choose one.)
7. Now using the toolbar at the top, highlight the words prior to and including the colon (:) and click the [B] to bold those words, just as you would in MS Word. (As seen in the example page of Scott Weber)
8. In the next blue section bar type "My Favorite Picture" in the text box. This will be used later.
9. Click "Save and Exit"
10. Note the status of this page in the upper left corner of the web author console is set to "Saved".
11. Click "Approve" in the web author console to approve this page

for publication.

Exercise 5: Adding a file from the resource gallery

Now using the resource gallery, you will add an image of the favorite fruit that you chose from the list of the four fruits.

1. Click in the text box where you want to add the picture
2. Click the insert image icon on your toolbar at the top of the page (next to the font size menu)
3. Click on "Insert Shared Image". (This is going to access images in the resource gallery.)
4. Click the plus (+) sign next to "example"
5. Click the plus (+) sign next to "images"
6. Click on the word "fruit"
7. You will now see a number of images of fruit. Here is where you will choose the image of your favorite fruit by clicking on the icon in the "Select" column next to the image that you wish to choose.
8. You will see optional properties where you can insert a hyperlink. This would be utilized if you would like your users to be able to click on your image and be taken to another page just as a hyperlink would. Insert text in the "Alternate Text" field that describes the image you are about to insert. It is optional to insert a hyperlink, however, for accessibility reasons, you must insert alternate text. Once you are done, click "Insert" at the bottom of the window and you will see the image on your page.
9. Select the image that you just inserted into your page and left-align it using the formatting tool bar at the top of your page.
10. Click "Save and Exit"
11. Note the status of this page in the upper left corner of the web author console is set to "Saved".

12. Click "Approve" to approve this page for publication.

Exercise 6: Adding an image to the resource gallery and utilizing it in your page

For the "My Favorite Picture" section you will find an image from the World Wide Web that you would like to add in this section. Bare in mind, copyright images may not be used on a live web site this site is for testing purposes only and will be deleted shortly after the training session. (No racy images please.)

1. Open a new browser window.
2. Go to <http://www.google.com>
3. Choose the "Images" link above the search box
4. Search for an image of your choice
5. Click the Google search button
6. Right click on your favorite image and select "Save Picture As"
7. Save this picture to your desktop and rename if necessary
8. Navigate to the CMS web site that you are working on
9. Choose "Resource Manager" from the Web author console at the top of the page
10. Click the plus (+) sign next to "example"
11. Click the plus (+) sign next to "trainees"
12. Click on your resource gallery
13. Click on the "Add New..." button in the bottom right area of the window
14. Click the "Browse" button to browse to the image on your desktop

15. When you have found your image click "open"

16. Enter a display name

17. Enter a description

18. Click OK

Now that this image has been added to the resource gallery, let's insert it into the page.

1. If you are not in edit mode click on "Switch to Edit Site" then click on "Edit in the web author console. If you are already in the edit site, click on "Edit" in the web author console.
2. Click in the text box where you want to add your favorite picture
3. Click the insert image icon on your toolbar at the top of the page (next to the font size menu)
4. Click on "Insert Shared Image" (This is going to access images in the resource gallery.)
5. Click the plus (+) sign next to "example"
6. Click the plus (+) sign next to "trainees"
7. Click on your resource gallery
8. Click the icon in the "Select" column next to your favorite image to select that image
9. Enter an alternate text description
10. Click OK
11. Click "Save and Exit"
12. Note the status of this page in the upper left corner of the web author console is set to "Saved"
13. Click "Approve" to approve this page for publication.

Exercise 7: Adding a link on your profile page that links to another page in the Web site

Now you will create text to make a hyperlink.

1. Navigate to your "Profile" posting by clicking on "Commerce Training Channel" in the left-hand navigation and then click on your channel (your first name and your last name (i.e. Scott Weber))
2. If you are not in edit mode click on "Switch to Edit Site" then click on "Edit in the web author console. If you are already in the edit site, click on "Edit" in the web author console.
3. Add some text below what you have already created in your profile which you can turn into a link. For example type "My favorite fruit is the banana" below your picture of a banana, or whichever fruit you chose
4. Now highlight the word "banana", or whichever fruit you chose
5. From the tool bar, click the standard hyperlink icon (it looks like a single chain link with a globe behind it)
6. Click the browse button
7. Click the plus (+) sign next to "example"
8. Click the plus (+) sign next to "fruit"
9. Select the fruit page that corresponds to the fruit word that you have highlighted
10. Click Insert
11. Notice the URL placed in the text field. It is an absolute URL that refers to the file on this site. Change it to be a relative to root URL by deleting the "http:// example.ky.gov" and only leaving this in the box "/fruit/bananas.htm".

NOTE: You do this because when we first develop your site you will be building in a test environment so this automatic

URL would be pointing to the test site. When your site is moved into production that URL will still be pointing to the test site, which is not correct. By making it relative we will always be referencing the current site in use whether it is the test site or the production site. (Any questions please ask)

12. Click OK

13. Click "Save and Exit"

14. Click "Approve" to approve your changes and this page for publication.